

HOW TO MAKE THE ASK

- 1. Set the example** • Make your pledge first and then ask the same of the leadership in your organization.
- 2. Be knowledgeable** • Review the materials in advance.
- 3. Formulate a plan** • Start the discussion on a positive, friendly note. • Explain the purpose of the visit. • Find out what he or she knows about the campaign. • Tailor the approach to each individual. • Utilize an agency speaker and/or employee testimonial at a meeting to share a story of how one of the organizations directly helped a member of the community.
- 4. Ask for the pledge** • Ask each person. Many do not consider an email or meeting as a personal ask. Exercise your judgment. • With new givers, ask for a first time gift. • For annual givers, thank them for past support and encourage an increased gift. • Remember you are not asking for yourself. You are asking for someone who needs help.
- 5. Answer questions and handle concerns** • Know your materials and answer questions honestly. • If you do not know the answer to a question, let the donor know you will find out. Ask a board member for clarification. • Recognize that some donors have real concerns. People have a right to give or not to give. • Do not argue. Still, help dispel any misconceptions. • Do not take a “no” personally.
- 6. Say thank you** • Regardless of what the donor decides, say thank you.